

**FINANCIAL POLICY & PLANNING DIRECTOR**  
(Unclassified Management)

**DEFINITION:**

Under administrative direction, to plan, direct, organize and coordinate the county's strategic financial planning policies and the annual operating budget; to act as principal budget and fiscal advisor to the Chief Financial Officer/Auditor and Controller; and to perform related work as required.

**DISTINGUISHING CHARACTERISTICS:**

This is an unclassified management class allocated only to the Department of the Auditor and Controller. The Financial Policy & Planning Director reports to the Chief Financial Officer/Auditor and Controller, and is responsible for planning, directing, organizing, and coordinating broad financial countywide goals and facilitating the decision making process for the county's Agency/Group's budget, and central fiscal analytical services and processes in the County of San Diego.

**EXAMPLES OF DUTIES:**

Plans, directs, organizes, and evaluates the overall activities involving the development and implementation of the county's broad financial goals and fiscal analytical services to the County; directs the preparation and presentation of the annual county budget; coordinates the financial planning of the Board of Supervisors' new or revised programs; directs the review and analysis of budget proposals using revenue and expenditure controls and reporting systems; oversees the capital program implementation; analyzes revenues and expenditures to determine the county's fiscal status; interacts with departmental management concerning funding requirements, revenues, and expenditures; works with executive staff on complex and countywide financial planning and budget issues (including execution of the Strategic Financial Plan (SP) and Annual Operation Budget (OB)); reviews and analyzes State legislature and budget proposals; oversees and ensures the timely release of the Strategic Financial Plan, Operation Budget, quarterly financial reports, economic and analytical studies; determines fiscal impact on county programs; presents reports to the Board, and prepares and implements Board policies and actions; represents the Chief Financial Officer/Auditor and Controller during Board conferences and other meetings with county staff, governmental agencies, private industries, and community organizations; and supervises subordinate staff and assigns analysts to fiscal/budget areas.

**MINIMUM QUALIFICATIONS:**

**Thorough Knowledge of:**

- Financial strategies used and fiscal requirements needed maintain a multi-functional governmental agency.
- Budgetary systems, including program, line item and zero-based.
- Financial management policy/procedure development and implementation related to countywide programs, activities, and operations.
- Federal/State legislative processes and funding practices related to local government, to include legal authority, joint powers agreements, and cooperative agreements.
- Economic analysis and forecasting.

- Principles and theory of finance and public administration including general administration, human resource management, fiscal management as applied to the overall management of a local governmental entity.
- Supervision and training principles and techniques.
- The General Management System in principle and in practice.

**Skills and Abilities to:**

- Plan, direct, organize, and coordinate the financial and budgetary planning and control over a local governmental entity providing a wide variety of health, social and safety protection services to the public.
- Prepare, review, present, and control all County and Special District budgets.
- Provide decision-making and program support to a local government's legislative authority.
- Identify budgetary or financial problems and develop and recommend solutions.
- Prepare executive-level correspondence and reports.
- Prepare and give public presentations on countywide activities, functions, and issues.
- Establish and maintain effective working and diplomatic relations with staff, the public, and representatives from governmental, industry, media, and other agencies.

**EDUCATION/EXPERIENCE:**

Education, training, and/or experience which demonstrates possession of the knowledge, skills and abilities listed above. An example of qualifying education/experience is: a bachelor's degree from an accredited college or university in business or public administration, economics, accounting, finance or a closely related field; AND, five (5) years of full-time management experience overseeing agency/group financial accounting/budget analysis, capital budgeting, economic analysis, strategic planning, policy and procedures establishment and implementation for a large public or private organization.

**SPECIAL NOTES, LICENSES, OR REQUIREMENTS:**

**License:**

A valid California Class C driver's license is required at time of appointment or the ability to arrange transportation for field travel. Employees in this class may be required to use their personal vehicle.

**Certification:**

Certification as a Certified Public Accountant (CPA) or Character Financial Analyst is highly desirable.